



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Liquor Purchasing Technician

Job Code Title

Purchasing Technician

Pay Band

4

Job Code Number

433614

Liquor Control Division

Liquor Distribution Bureau

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state agency liquor stores and administers the laws governing the sale, taxation, and licensing of alcoholic beverages and tobacco products; returns unclaimed property to its rightful owners; and determines how state taxes and liquor and tobacco laws apply to Indian Tribes and tribal members in Indian Country.

The Liquor Control Division administers the state's Alcoholic Beverage Code which governs the control, sale, and distribution of alcoholic beverages. The division provides customer service with a focus on public safety to ensure a safe, orderly, and regulated system for the convenient distribution and responsible consumption of alcoholic beverages. The Liquor Control Division includes the Administrative Team, Liquor Distribution Unit, and Liquor Licensing Bureau. The Liquor Distribution Bureau manages state wholesale liquor operations including warehouse shipping and receiving, accounts receivable and payable, inventory management, liquor order processing, agency contract management, and customer service.

Job Responsibilities

The Liquor Purchasing Technician procures stock necessary to satisfy special order requests made by agency liquor stores and ensures inventory meets the laws and rules for Montana. This includes responsibility for administering liquor distribution program operations and support services to facilitate and document liquor procurement, inventory management, and related activities. The incumbent also provides a range of services to support ongoing office operations and activities including reception, business communications, event coordination, and mail distribution. This position reports to the Liquor Distribution Bureau Chief and does not supervise other staff.

- **Program Coordination and Procurement 70%**

1. Responds to inquiries and refers to program policies and procedures to assist internal and external customers with division-related questions. Follows-up with customer to ensure timely closure. Researches or refers inquiries as necessary to provide information, forms, and process assistance and timely responses.
2. Maintains, tracks, and researches information using a variety of database systems including the department's integrated tax system (GenTax). Maintains electronic and manual records systems to ensure the accuracy, accessibility, and security of information by compiling and storing relevant data. Maintains databases and files with current information, generates standard reports, and provides records as requested.

3. Researches new liquor and fortified wine products via the internet, trade publications, and other sources to obtain pricing for liquor store agents. Establishes relationships with new vendors to obtain requested products and to respond to special requests.
4. Places and tracks sales orders with vendors to acquire distilled spirits and fortified wine products to meet retail special order requests in a cost-effective and compliant manner. Requests pricing information, prepares purchase orders, and enters product information into the warehouse system.
5. Works with vendors, representatives, and other department staff to determine status of special order requests. Develops methods to routinely communicate status of special order requests to liquor store agents.
6. Compiles holiday promotional material from liquor vendors and disseminates information to agency liquor store agents. Gathers agency liquor store requests and stages product for shipment upon arrival.
7. Compiles information to prepare written statistical and narrative status reports as directed.
8. Identifies and communicates products that could be considered deceiving to underage consumers and communicates this to the unit manager. Obtains pictures of new items or links to product websites in order to view the packaging, labeling, and advertising associated with the product. Ensures only products approved by the department are made available to agency liquor stores.
9. Records products received into the warehouse to ensure the proper goods were received according to the order and that inventory records are accurate and current. Inspects products received. Compares orders, shipments, and receipts to ensure accountability of all products. Enters products received into the GenTax system. Discusses defective or unacceptable goods and services with vendors and others to determine the source of problems and initiate appropriate corrective action.
10. Confers with vendors to obtain product information such as price, availability, and delivery schedule.

- **Administrative Services 20%**

1. Responds to general inquiries; provides directions or guides visitors to various locations; locates or compiles general program information; and maintains a professional, courteous atmosphere for office staff, agency representatives, members of the public and other visitors.
2. Writes, transcribes, and proofreads a variety of memoranda, correspondence, informational materials, and other documents to ensure accuracy and completeness of language and format. Coordinates document reviews, revisions, and signatures; reproduction; and dissemination as requested.
3. Maintains and updates various forms, templates, references, and other documents to provide complete and concise tools for recording, tracking, and reporting operational and program information. This may include receiving, reviewing, and compiling standardized forms such as surveys, applications, orders, online requests, and others.
4. Sorts; routes; and distributes mail, facsimiles, and electronic messages to ensure timely delivery of correspondence and materials. Coordinates express shipments (UPS, Federal Express), registered and bulk mail, and other specialized delivery services with staff and service providers. Prioritizes mail to ensure that urgent incoming and outgoing mail is processed accordingly.

- **Liquor Store Order and Store Support 5%**

1. Receives orders from agency liquor stores through various methods tailored to specific agency liquor stores. Orders are received as faxes, spreadsheets, and text documents that must be processed according to format and the ordering store to ensure accuracy. Reviews the information and compares it to the specific store's sales history. Contacts the store owner if the order looks questionable or changes the order to make sense.
2. Confirms orders by communicating with agency store owners regarding the availability of products ordered, possible substitutions if a product is unavailable, and delivery updates.

3. Updates orders with changes based on information provided in the confirmation and communications from agency store owners. Uploads finalized orders to generate pick lists and invoices. Reviews the progress of all orders and resolves problems to ensure customer satisfaction.
4. Looks up and verifies product specifications, prices, sales histories, and other pertinent information to answer requests from agency liquor stores using the warehouse management system.

- **Other Duties as Assigned 5%**

1. Performs a variety of other duties as assigned by supervisors.

Job Requirements

To perform successfully as a liquor purchasing technician, incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in identifying and resolving clerical errors; mathematics; compiling and analyzing data from multiple sources; multi-tasking; paying attention to details and accuracy; managing multiple priorities under tight deadlines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; following written and oral directions and instructions; and word processing, spreadsheet, and database applications are required. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of office operations; business communications; records management; customer service standards; state and department policies; annual program plans; and word processing, database, and spreadsheet applications.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is one year of post-secondary education or training in accounting, purchasing, procurement, business, office administration, or directly related field and two years of job-related work experience.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to workload, deadlines, time constraints, nature of contacts, and coordination of administrative functions. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. The job requires some travel and a valid Montana driver's license. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Shauna Helfert, Division Administrator Date: June 2012

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: July 2012

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____

Date: _____

Name (print): _____